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Date: 3/1/2013

GAIN Report Number: FR9134

EU-27

Poultry and Products Semi-annual

EU-27 Poultry Exports in 2013 Impacted by Lower Restitutions

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Report Highlights:

EU-27 broiler meat production is revised slightly downward from the official USDA estimate, due to production declines in France and the UK more than offsetting the expected higher production in Benelux, Germany, and Poland. Domestic consumption is unchanged as consumers switch from other meats to broiler meat (cheaper and more convenient) in a recession-stricken EU-27 region. Imports remain flat as higher imports from Thailand will not compensate smaller imports from Brazil. Exports are revised downward due to the halving of EU-27 exports restitutions, which would likely hurt French exports of whole broilers to Middle-Eastern countries.

Commodities:

Poultry, Meat, Broiler

Production:

2013 EU-27 broiler meat production is revised slightly downward from the official USDA estimate, due to declines in France, which driven by declining exports for whole broilers and the troubled economic situation of DOUX -the major producer and the UK. This decline more than offsets the higher production expected in Germany, Poland and Benelux, the latter being driven by increased exports of broiler parts to Africa.

Consumption:

The 2013 EU-27 domestic consumption of broiler meat is unchanged, due to consumers switching from other meats to broiler meat (cheaper and more convenient) in a recession-stricken EU-27 region.

Trade:

The broiler meat import forecast for 2013 remains flat, since higher imports from Thailand were offset by lower imports from Brazil. Imports of prepared preserved and processed broiler parts (HS Code 160232) are expected to be lower due to the economic downturn in the EU-27 region.

EU-27 broiler meat exports in 2013 are revised downward as a consequence of the recent EU-27 Commission's decision to reduce export restitutions by 50 percent. Decreased whole broiler exports, mainly from France to Middle-Eastern countries, support this revision. Broiler bone-in part exports to Africa, mainly from the Benelux region, do not offset decreased exports of whole broilers.

Production, Supply and Demand Data Statistics:

Poultry, Meat, Broiler EU-27	2011		2012		2013	
	Market Year Begin: Oct 2010		Market Year Begin: Oct 2011		Market Year Begin: Oct 2013	
	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Inventory (Reference)	0	0	0	0	0	0
Slaughter (Reference)	0	0	0	0	0	0
Beginning Stocks	0	0	0	0	0	0
Production	9,310	9,320	9,480	9,510	9,580	9,550
Total Imports	722	731	740	718	750	720
Total Supply	10,032	10,051	10,220	10,228	10,330	10,270
Total Exports	1,035	1,037	1,080	1,090	1,120	1,060
Human Consumption	8,997	9,014	9,140	9,138	9,210	9,210
Other Use, Losses	0	0	0	0	0	0
Total Dom. Consumption	8,997	9,014	9,140	9,138	9,210	9,210
Total Use	10,032	10,051	10,220	10,228	10,330	10,270
Ending Stocks	0	0	0	0	0	0
Total Distribution	10,032	10,051	10,220	10,228	10,330	10,270

MIL HEAD, 1000 MT, PERCENT, PEOPLE, KG

Note: Per revised FAS instructions, exports of chicken paws to Hong Kong and China have been excluded from EU-27 Broiler Meat exports. Hong-Kong and China imports of chicken paws from EU-27 amounted to 37,500 MT in CY 2012, down 50 percent from CY 2011.

